



ANNUAL REPORT

Massachusetts Association of Assessing Officers, Inc.
July 1, 2024 - June 30, 2025

Annual Meeting June 23, 2025
Hotel 1620 Plymouth, MA

www.maaao.org

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PURPOSE AND EXECUTIVE BOARD

The Massachusetts Association of Assessing Officers is a statewide organization of over 1,500 professionals dedicated to providing local communities with accurate and reliable information upon which to manage municipal finances. Whether times are good or challenging, assessors make a difference by bringing experience, attention to detail and revenue management skills to municipalities, enabling city and town officials to deliver timely budgets that are accurate and balanced. Throughout the fiscal year, assessors work closely with mayors, town managers and administrators, boards of assessors, finance professionals and State officials.

The purpose of this organization is to educate the assessing officers of Massachusetts and their assistants in the field of assessing in the Commonwealth; to assist in creating efficient and uniform administration of local tax laws; to afford opportunity for the discussion of subjects pertaining to local taxation; to provide methods for encouraging the development of desirable tax laws and to discourage the adoption of harmful measures relating to taxation or to the duties of local taxing officials; and to promote public understanding of the work of Assessing Officials on their behalf to the general public.

Fiscal Year 2026 Executive Board

President: William B. Mitchell, MAA, RMA - North Andover

President Elect: Eric Josephson, MAA - Weston

Immediate Past President: Ashlie Brown, MAA - Westfield

Secretary: Ellen Brideau, MAA - Lowell

Treasurer: Ruth Anderson, MAA - Shrewsbury

Stephen J. Dunn, RMA, RA - Stoughton

Jessica Guerra, MAA - Springfield

Sara MacLellan, MAA - Melrose

Tara Monroe, MAA - Yarmouth

Kathleen Stanley, MAA - Charlton

Joseph Roche, MAA - Carver

EXECUTIVE DIRECTOR'S REPORT

Dear members and affiliates,

As I reflect on the past fiscal year I am filled with pride and gratitude in what we as an association have accomplished.

When I accepted the opportunity to be the Executive Director of MAAO I had hoped that with the help of the leadership, members and everyone who rolls up their sleeves to get the job done we would accomplish some strategic progress and real growth. I am happy to report we are on our way to reaching our goals and I am incredibly proud of what we have achieved.

In Fiscal Year 2025 we offered solid educational opportunities throughout the year. The increase in member participation for each event is a testament to the hard work and planning by the Education Committee. I would like to thank the Co-chairs, Missy Couture-Rimbold and Jessica Guerra for their support and for making education meetings just too much fun.

With the guidance of the Professional Admissions Committee, under the leadership of Steve Dunn, we were able to designate and recertify many members of the association and provide certificates of achievement for our CAA and MAT recipients. Their commitment elevates our members and our profession.

The Legislative Committee is instrumental in steering our ship through what can be turbulent waters and advising us on the best path forward. Thank you, Lane Partridge and Kathleen Colleary.

I would also like to thank the ATB, Marketing/Social Media, the Awards and Welcome Committees for hitting it out of the park and continually making us look good!

Last, I would like to thank the Treasurer, Ruth Anderson, the Membership Coordinator, Maggie Fitzpatrick, and the Education Admin, Sue Lemay for taking my calls at ridiculous hours of the morning and answering my questions when I need a "gut check". The amount of work they do behind the scenes is truly impressive.

EXECUTIVE DIRECTOR'S REPORT

This year I have enjoyed strengthening our county affiliations and am continually impressed by the opportunities they offer their members. I am looking forward to collaborating with each of the counties and serving as a resource for them going forward.

We have also worked to expand our partnership with our vendors who have supported the association both educationally and financially. Their participation is invaluable to our members.

In the coming fiscal year, I hope to expand on what we have achieved to date. We will continue to strive to keep the Association fiscally responsible and sound, offer solid educational and scholarship opportunities and bring new faces and ideas to both our leadership and membership.

We are also looking forward to introducing a new website that is currently under construction and utilizing social media to better communicate and disseminate information more efficiently.

Finally, I would like to express my deepest gratitude for our current President, Ashlie Brown, and our Executive Board, which supports the work of the Association. They lift me up when I am doubtful, energize me every day and make meetings and conferences ridiculously fun.

I am looking forward to the opportunities, collaborations and camaraderie this coming year, and anticipate great things for us all in Fiscal Year 2026.

Respectfully submitted,
Kathleen Costello, MAA
Executive Director

PRESIDENT'S REPORT

As I reflect on Fiscal Year 2025, I am deeply inspired by the passion, professionalism, and teamwork that define the Massachusetts Association of Assessing Officers. Our shared commitment to public service and continuous improvement has allowed us to accomplish great things together—and I'm honored to highlight those efforts in this year's report.

Executive Board

First and foremost, I want to express my sincere thanks to the Executive Board. Your leadership, collaboration, and forward-thinking approach have been critical to our success this year. Whether navigating complex issues, offering strategic direction, or simply being a sounding board, your contributions have made a lasting impact. Thank you for your time, energy, and dedication—you set the tone for the entire organization.

Administrative Team

Behind every great organization is a powerhouse team that keeps everything running smoothly. Our Administrative Team has been just that—an essential force of efficiency, coordination, and positivity. Thank you for managing the countless logistics, communications, and details that keep MAAO thriving. Your professionalism and can-do spirit do not go unnoticed, and we are lucky to have you on our side.

Committees

The heart of MAAO lies in the work of our committees. This year, each group demonstrated creativity, commitment, and excellence, raising the bar for what we can accomplish together.

Education Committee

A standing ovation is in order for the Education Committee—thank you to our Co-Chairs, Jess Guerra & Missy Couture Rimbold, and all Committee Members for your hard work and vision. Your efforts to review and revise policies brought much-needed clarity and relevance to critical topics. From the intricacies of the Assessor Calendar to advanced topics like Commercial Appraisals and Residential Cost Modeling, your work supports assessors across the Commonwealth. You also enhanced our educational offerings and made resources more accessible and actionable—truly the gold standard for professional development.

PRESIDENT'S REPORT

Legislative Committee

To our powerhouse Legislative Committee: your passion for policy and advocacy is truly commendable. Thank you to the Co-Chairs, Lane Partridge & Kathleen Colleary, and Members for staying on top of legislative changes, proposing bills, and keeping MAAO informed and proactive. Your dedication helps shape a better legal landscape for assessors, and your work behind the scenes makes a difference in ways that ripple far beyond the State House.

Marketing & Social Media Committee

Creativity met communication this year with our Marketing and Social Media Committee leading the charge. Thank you to the Chair, Mia Robinson and members who brought flair and innovation to every slide, poll, and post—keeping our members engaged, informed, and occasionally entertained! Whether online or in person, you helped MAAO connect with its community in new and exciting ways.

Professional Admissions Committee

Professionalism is the cornerstone of our work, and the Professional Admissions Committee has been steadfast in upholding that standard. A big round of applause to the long-time Chair Steve Dunn and Members who awarded 22 new MAA designations this year—each one representing hard work, integrity, and a commitment to excellence. With 91 recertifications and updated policies to better align with current education standards, your work continues to elevate the profession and set a clear path for future assessors.

Policy Review & ATB Committee

To the Policy Review & ATB Committee—thank you for your thoughtful, strategic work this year. You've strengthened our connections with key institutions and created valuable learning opportunities through engaging webinars. Your work continues to lay the groundwork for assessors to navigate complex issues with confidence and clarity.

PRESIDENT'S REPORT

Newsletter

Special recognition goes to Ellen Brideau, our talented Editor in Chief, for turning news into knowledge and keeping our membership in the know. Thank you to all who submitted articles, shared insights, and contributed updates. And a warm thank-you to the Counties—your regular updates and contributions make the newsletter a true reflection of our collective work and voice.

Scholarships & Awards

To the Chair, Megan Foster and team behind our Scholarships & Awards—thank you for ensuring opportunities are within reach for all. This year, we proudly awarded 8 scholarships to support core course attendance and 6 scholarships for conference registration. These investments reflect our commitment to access, equity, and professional growth.

IAAO & NRAAO Representatives

A big thank-you to our representatives who serve as vital links to the broader assessing community. Your work as ambassadors to IAAO and NRAAO helps strengthen our relationships and ensures MAAO remains connected, informed, and influential on the regional and national stage.

In closing, thank you to every MAAO member, vendor, partner, and supporter who made this year a success. Fiscal 2025 was a year of progress, purpose, and people—each of you played a role in that. Let's carry this momentum forward as we continue to support one another and elevate the profession we're proud to represent.

With gratitude,
Ashlie J. Brown, MAA
President

SECRETARY'S REPORT

Annual Meeting Minutes, June 24, 2024 (Amended)

MAAO Annual Meeting, Plymouth, MA

1. Call to Order

The meeting was called to order at 3:25 PM by Lane Partridge, MAA, Barnstable, President of the MAAO.

2. Presentation of Annual Committee Reports

A motion to move the reading of the 2024 Annual Report was made by Steve Dunn, 2nd by Brad Swanson. Motion carries. A motion to accept the 2024 Annual Report was made by Bill Mitchell, 2nd by Ken O'Brien. Motion carries.

3. President's Report

Lane Partridge delivered the President's Report, expressing his sincere appreciation to all members in attendance, as well as to the Executive Board and the Education Committee for their dedication and efforts over the past year. He highlighted key events and accomplishments of the year.

4. By-Law Committee Report

Missy Couture Rimbald reported that the By-Law Committee has continued to updated the MAAO By-Laws and two items are required to be voted on today. She thanked Bill Mitchell, Ashlie Brown and Ruth Anderson for their input. The Treasurer and Secretary are at every meeting of the Executive Board and have no vote due to the by-laws not specifying it. Today we are asking for a vote to change the by-laws to include these two positions to allow those two positions to have voting rights. A motion to accept the By-Laws Committee recommendation to allow voting rights for the Secretary and Treasurer was made by Ken O'Brien, 2nd by Brad Swanson. Motion carries.

5. Announcement of Fiscal Year 2025 Election Results & Nominating Committee Report

The results of the FY2025 Executive Board election were presented by the Nominating Committee.

SECRETARY'S REPORT

Annual Meeting Minutes, June 24, 2024

FY2025 Election Results

PRESIDENT ELECT Select ONE (1) Ballots Cast: 412

*** William Mitchell, MAA 294 71.36%
Richard Conti, MAA 114 27.67%
Write In Robert Alford, MAA 3 0.73%
Leandro DiFilippo 1 0.24%
Abstain 4

EXECUTIVE BOARD Select TWO (2) Ballots Cast: 407

*** Sarah MacLellan, MAA 204 50.12%
*** Tara Monroe, MAA 196 48.16%
Donald Clarke, MAA 189 46.44%
Kimberly Mew, MAA 125 30.71%

Write In 1 Robbie Alford 6 1.47%
Leandro DiFilippo 2 0.49%
Michael Flynn, MAA 2 0.49%
Ed O'Neil 1 0.25%
Kathleen Costello 1 0.25%
Meredith Stone 1 0.25%
Richard Conti 1 0.25%
Scott Timulty 1 0.25%
Stephen Cortes, MAA 1 0.25%

Write In 2

Michael Flynn 1 0.25%
Abstain 9

ELECTION STATISTICS

Ballots Returned 416
Eligible Members 1055
Percent Returned 39.43%

Ellen Brideau, MAA, Chair of the Nominating Committee, acknowledged and thanked the committee for their efforts in recruiting new candidates for leadership positions. She encouraged all members to remain engaged and consider volunteering, emphasizing that the strength of the Association lies in the active participation of its members.

Note: The newly elected officers will be formally sworn in during the Vision Government Solutions Assessor Appreciation Event.

SECRETARY'S REPORT

7. Awards Presentation

Megan Foster, MAA, Chair of the Awards Committee, presented the following honors:

- Past Presidents Award: Bradford W. Swanson, MAA – Middleton
- Wilson Award: Jacquelyn Boyden, MAA – Erving
- Robert J. Ellia Executive Director's Award: Joanne Foley, MAA - Tewksbury
- The NRAAO's Sherry Vermilya Award: Joanne Foley, MAA – Tewksbury

8. Professional Designation Recognition

In the absence of Stephen Dunn, Chair of the Professional Admissions Committee, President Lane Partridge awarded Colin Keohane of Barnstable, MA with his MAA designation.

9. Special Recognition Award

President Partridge and Executive Director Kathleen Costello presented an award to Matthew J. Thomas, Esq in recognition of his unwavering dedication, valuable insight, and steadfast support to the members of MAAO.

10. Presentation of Ed Childs Memorial Scholarship Award

President Partridge presented the Ed Childs Memorial Scholarship to Lucas Wilt son of Iwona Zamienska-Wilt, Deputy Assessor in Saugus. Lucas will be attending UMASS Lowell in the fall.

11. Presentation of the President's Gavel

Lane Partridge, MAAO President, formally presented the President's Gavel to incoming president Ashlie Brown.

10. Adjournment

Motion: A motion to adjourn the meeting was made at 3:47 PM by Ellen Brideau and 2nd by Brad Swanson. The meeting was adjourned.

Respectfully Submitted,
Ellen Brideau, MAA
Secretary

TREASURER'S REPORT

Fiscal 2025 was a year of adjustments as costs to run educational events spiraled upward along with the price of eggs. While we maintain a solid financial foundation, our balance sheet shows less of a cushion than that enjoyed in years past when we were riding the wave of fully remote events that generated substantial income with very little overhead. We also made significant investments in the website, and delivered phenomenal educational events throughout the year, thanks to the leadership of the Executive Board, Executive Director Kathy Costello and incredible offerings by the Education Committee.

All day-to-day banking continues to be done through Unibank for Savings. As an institution with broad experience in municipal finance, they have proven to be a great partner through the last several years. The Association also holds investment accounts with Bartholomew & Company, and purchased treasury bills to take advantage of high interest rates, through LPL Financial. Payroll continues to be processed with Complete Payroll Solutions/solved People Cloud on a bi-weekly basis through their online portal. Our accounts are audited annually by Alario & Associates, CPA, out of Worcester and Leominster.

Receivable and expense balances are maintained in real-time through Quickbooks and are reviewed and approved monthly. Interest rates appear to be staying at the elevated levels achieved during 2022 and 2023.

Attached are the Balance Sheet as of June 30, 2024, and the Profit and Loss Statement from July 1, 2024 through May 30, 2025.

Respectfully submitted,
Ruth Anderson, MAA
Treasurer

Balance Sheet
Massachusetts Association of Assessing Officers (MAAO)
As of June 30, 2024

DISTRIBUTION ACCOUNT	TOTAL
Assets	
Current Assets	
Bank Accounts	
60340 Scholarship Fundraising	-325.00
LPL Brokerage Account	106,295.37
PayPal Funds held	
Shrewsbury Credit Union	0
Scholarships	
Total for Shrewsbury Credit Union	0
Unibank	\$80.00
Unibank Checking	104,078.98
Unibank Money Market/Savings	5,623.38
Unibank Money Market/Scholarships	10,247.77
Total for Unibank	\$120,030.13
Total for Bank Accounts	\$226,000.50
Accounts Receivable	
11000 Accounts Receivable	21,762.50
Total for Accounts Receivable	\$21,762.50
Other Current Assets	
12000 Undeposited Funds	
14000 Prepaid Expenses	
Total for Other Current Assets	0
Total for Current Assets	\$247,763.00
Fixed Assets	
15000 Furniture and Equipment	\$7,871.44
15010 Accumulated Depreciation	-4,435.00
Total for 15000 Furniture and Equipment	\$3,436.44
Total for Fixed Assets	\$3,436.44
Other Assets	
18400 Commonwealth Financial Network	0
18500 General Investment Account	191,472.09
18550 Scholarship Funds	31,468.01
Total for 18400 Commonwealth Financial Network	\$222,940.10
18600 Other Assets	700.00
18700 Security Deposits Asset	801.00
Total for Other Assets	\$224,441.10
Total for Assets	\$475,640.54

Balance Sheet
Massachusetts Association of Assessing Officers (MAAO)
As of June 30, 2024

DISTRIBUTION ACCOUNT	TOTAL	
Liabilities and Equity		
Liabilities		
Current Liabilities		
Accounts Payable		
20000 Accounts Payable		
Total for Accounts Payable		0
Credit Cards		
Bank of America Credit Card		
Unibank Credit Card		
Total for Credit Cards		0
Other Current Liabilities		
20050 Accrued Payroll		1,462.41
25000 Unearned Customer Payment		19,552.50
60999 Refundable Advance		
A/P other		
Total for Other Current Liabilities		\$21,014.91
Total for Current Liabilities		\$21,014.91
Long-term Liabilities		
Total for Liabilities		\$21,014.91
Equity		
32000 Unrestricted Net Assets		383,789.52
Net Income		33,149.26
30000 Opening Balance Equity		
33000 Board Designated		37,686.85
Total for Equity		\$454,625.63
Total for Liabilities and Equity		\$475,640.54

Profit and Loss
Massachusetts Association of Assessing Officers (MAAO)
 July 1, 2024-May 31, 2025

DISTRIBUTION ACCOUNT	TOTAL
Income	
44800 Professional Designation Income	12,625.00
45000 Investments	\$3,724.91
46400 Other Types of Income	0
46410 Advertising Sales	100.00
46420 Sponsorship Income	18,250.00
46430 Miscellaneous Revenue	\$8,375.00
Total for 46400 Other Types of Income	\$26,725.00
47200 Membership Income	0
47231 Individual Dues	74,275.00
47232 Retired Membership	450.00
47250 Subscribing Dues	4,400.00
Total for 47200 Membership Income	\$79,125.00
49000 Educational Events Income	70,900.00
49400 Annual School Income	\$88,725.00
49500 Conferences Income	\$11,650.00
49600 Clerks Meetings Income	90,175.00
49800 Winter School	\$261,450.00
Total for 49000 Educational Events Income	\$383,649.91
Total for Income	
Cost of Goods Sold	
Gross Profit	\$383,649.91
Expenses	
60300 Awards and Grants	\$2,850.00
60900 Business Expenses	\$2,281.55
62100 Contract Services	\$38,591.84
62800 Facilities and Equipment	\$59,516.35
64000 Officers & Committees Expenses	\$28,878.18
65000 Operations	\$2,874.17
65100 Other Types of Expenses	\$2,585.00
66000 Payroll Expenses	\$126,774.33
67200 Membership Expenses	\$1,152.23
68300 Executive Director	\$2,164.29
69000 Educational Events Expenses	\$60.25
69100 Educational Course Expenses	\$22,686.98
69400 Annual School Expenses	\$89,049.41

Profit and Loss
 Massachusetts Association of Assessing Officers (MAAO)
 July 1, 2024-May 31, 2025

DISTRIBUTION ACCOUNT	TOTAL
69500 Conferences Expenses	\$65,686.79
69600 Clerks Meeting Expenses	\$9,244.50
69800 Winter School Cost	29,005.00
Total for 69000 Educational Events Expenses	\$215,732.93
69900 Uncategorized Expenses	1,093.30
Total for Expenses	\$484,494.17
Net Operating Income	-\$100,844.26
Other Income	
40000 Investment Income	\$6,402.92
42890 Rent, Parking, Utilities	14,757.00
Total for Other Income	\$21,159.92
Other Expenses	
Net Other Income	\$21,159.92
Net Income	-\$79,684.34

EDUCATION COMMITTEE REPORT

The MAAO Education Committee is a dedicated and committed group that strives to bring relevant and interesting educational offerings to the membership. The Committee members volunteer their time for the benefit of all members and as education co-chairs, we thank them and we're grateful to have them serving the organization.

The Education Committee relies heavily on our talented and experienced instructors and presenters. We are extremely grateful for their willingness to share their expertise, their time, and their energy. Many of our instructors and presenters are volunteers who provide quality education for the benefit of our organization.

Fiscal Year 2025 educational opportunities covered a wide variety of interesting topics.

The year began with a webinar in July on the Assessor's Monthly Calendar of Events.

Then it was off to Southbridge for Annual School, offering all core courses along with 7-hour and 15-hour USPAP courses. Specialty courses included Data Collection/Data Collection Manual, Chapter Land, Public Speaking and Effective Communication, Data Quality Study, Solar Real and Personal Property Taxation Issues, Taxation/Valuation of Billboards and Cell Towers, Excise Local Options, DOR Updates, Bundle of Sticks, Income and Expense Forms/Valuation of Mixed-Use Properties, TIF/TIE/STA's Best Practices in Negotiation and Implementation.

Three in-person clerks' meetings were held in Chelmsford, Holyoke, and Westport where topics covered everything from resources to procedures that clerks deal with.

The two-day Fall Conference in Southbridge covered all things GIS. The conference started with an overview given by Mass GIS. The afternoon led into Technical Jargon presented by Tighe and Bond and Data Analytics presented by CAI. Day Two of the conference covered a live session with Mass GIS Data layers followed by Master Address/Condos given by Schneider Geospatial. The conference ended with Best Practices.

November brought a free webinar as part of the MAAO Webinar Series, "Coffee and Chaos with Kathleen", in which Kathleen Colleary covered personal exemptions and took a dive into everything from general administration, eligibility requirements, local options, and recent changes in legislation.

EDUCATION COMMITTEE REPORT

Winter Meeting was held virtually and covered a Commercial Appraisal Review: Preparing for ATB by Thomas Jensen; Jurisdictional Documents presented by the ATB; and Preparing Interrogatories by Attorney Matthew Thomas.

Virtual winter school, which offered all core courses, ran from March through April. USPAP 7-hour was also offered.

Spring Conference brought us to Lake Pearl in Wrentham. Edye McCarthy and Ellen Brideau covered Residential Cost Modeling. Lane Partridge and Kathleen Colleary provided a Legislative Update. Attorney Matthew Thomas closed the day out with an Economic Development Bill update.

April brought the final MAAO Webinar series for the year, Mastering Motion Sessions. This was a 2-part webinar series with an overview given by the ATB. Day One covered types of motions, procedural rules and documentation requirements. On Day Two, participants logged into the ATB live Motion Session and were able to witness an actual Motion Session firsthand. The session ended with live Q & A. Our thanks to Clerk Doherty, Attorney Cella and Chairman DeFrancisco for their collaboration.

To wrap up the fiscal year, the Summer Conference in Plymouth offers topics including How to Monitor a Revaluation, Office and Industrial Flex Appraisal Overview, Battery Storage, Dual Use Solar, DLS Law, BLA: What they are seeing and how assessors can improve on it, Mass GIS, Legislative Update, and ATB will be joining us.

Many thanks to all who make education important to MAAO!

Respectfully submitted,
Jessica Guerra, MAA – Springfield
Melissa Couture Rimbald, MAA - South Hadley
Education Committee Co-Chairs

2024-2025 Committee Members

Don Clarke, Ashland
Joanne Dillon, Milford
Michele Keohan, Reading/North Andover
Kelly McCormick, Hampden

Joe Roche, Carver
Ryan Rondeau, Lowell
Anne Marie Sinnott, Marshfield
Mary Oliver, BLA Rep

PROFESSIONAL ADMISSIONS COMMITTEE REPORT

2024 – 2025 Year Recap

Over the past year 22 members received their MAA designation, 9 members received a CAA certificate, and 3 members received a MAT certificate. The committee also reviewed over 100 designation recertification applications.

Continued effort was made to make sure the MAAO website has all the information a member would need to determine the designation qualifications as well as the requirements for recertification.

The Committee also clarified that any member who has not maintained their designation may reactivate their designation by submitting 28 hours of continuing education credits from the two years prior to the date of application, which must include a current USPAP update along with the \$100 recertification fee.

As of January 1, 2026 any member applying for a designation or renewing their existing designation must have completed the most current version of USPAP, 15 hour for designation and 7 hour update for recertification. As stated in the USPAP preamble, the purpose of USPAP is to promote and maintain a high level of public trust in the assessing practice by establishing requirements for assessors. By being a member of MAAO you have agreed to its Code of Ethics and having the most current version of USPAP, the foundation of valuation only further exemplifies a member's professionalism and commitment to property valuation.

Respectfully submitted,

Stephen J. Dunn, Chair
Eric Henderson, Vice Chair
Ellen Blanchard
Sarah Chase
Allan S. Cohen
Chris Gaeta
Christopher Keefe
William B. Mitchell
Bruce A. Symmes
Paula J. Wolfe

AWARDS COMMITTEE REPORT

ROBERT J. ELLIA EXECUTIVE DIRECTOR AWARD

The MAAO Executive Board voted to create the Robert J. Ellia Executive Director Award in memory of our first Executive Director and friend. This annual award is presented to an assessor who has dedicated themselves to mentoring others through leadership, guidance and education. This person always strives to each others about our Association to strengthen the profession and should exemplify professionalism and friendship to others.

The 2024 Robert J. Ellia Executive Director award was presented to:

Joanne Foley, MAA, Tewksbury

THE WILSON AWARD

The MAAO Executive Board voted to establish the Wilson Award, which was funded through a generous donation from the late Edward C. Wilson, former Associate Tax Commissioner and Belmont Assessor, in memory of his wife. This annual award is presented to the assessor who has made the most outstanding contribution to the assessing profession, and who has dedicated themselves to the field of assessing and the community and State they represent. Massachusetts Assessors are asked to nominate a candidate that they feel best exemplifies our profession.

The 2024 Wilson Award was presented to:

Jacquelyn Boyden, MAA, Erving

THE PAST PRESIDENT'S AWARD

The Past President's Award is presented to the assessor who has made outstanding contributions to the Massachusetts Association of Assessing Officers and the goals that the Association espouses.

The 2024 Past President's Award was presented to:

Bradford Swanson, Middleton

AWARDS COMMITTEE REPORT

PHILLIP J. WATERMAN JOURNALISM AWARD

In 2016, the MAAO instituted the Phillip J. Waterman Journalism Award. Phil was a Past President of the MAAO and was one of the founders of the MAAO Newsletter. He served the Association for many years as an officer, instructor and author of courses for the MAAO education program. We instituted this award in his name to honor his service and dedication to the MAAO. Each year we solicit articles from our membership. All articles published in the MAAO Newsletter will be considered for this annual award.

The 2024 Phillip J. Waterman Journalism Award was presented to:

Kevin Rudden, MAA, Holliston

SPECIAL RECOGNITION

In addition to our annual awards, special recognition was given to **Matthew J. Thomas, Esquire**, at the Summer Conference in appreciation of his dedication and contributions to the MAAO.

Respectfully submitted,
Megan Foster, MAA - Groton
2024 Awards Committee Chair

LEGISLATIVE COMMITTEE REPORT

June 2025

The MAAO Legislative Committee proposes a legislative package for consideration by the Executive Board and advocates for the legislation during the legislative session. It also tracks other bills that could impact assessing operations and responds to and comments on legislative issues as requested.

During the MAAO's 2024-2025 year, the Legislature completed one two-year session (2023-2024) and began a new one in January (2025-2026). Several of our bills made considerable progress last session, but none were enacted. Working with Charles Stefanini our legislative agent, we obtained legislative sponsors to refile them for this session. We also had one new bill filed. All bills have been assigned to legislative committees, primarily the Joint Committee on Revenue. When our bills are scheduled for committee hearings, we will provide testimony and advocate for these bills.

The Legislative Committee will also be following the "Municipal Empowerment Act," which was refiled by Governor Healey at the beginning of new session. As with the bill filed last year that only progressed through the assigned committees, the refiled bill contains many sections of interest to assessors including some that mirror bills we filed. Last year, the Legislative Committee and the Executive Board surveyed the MAAO membership and testified before the Joint Committee on Revenue about those sections. The bill (HD4360) has not yet been assigned to committees, but we will be monitoring its progress and providing testimony at the appropriate time.

As of June 1, 2025, the status of our Legislative Agenda for this session is as follows:

H. 3099 An Act Providing for a Means Tested Senior Citizen Property Tax Exemption

By local option, would allow municipalities to implement a standard senior citizen means tested property tax exemption based on the eligibility criteria for the state income tax Circuit Breaker Tax program. The amount of the exemption is determined locally and provided for within the residential class, like the residential exemption.

Sponsor: Rep. William Galvin

2025-26: Revenue Committee

2023-24: Favorable from Revenue Committee. House Third Reading

Please note that Section 53 Governor Healey's Municipal Empowerment Act includes a Senior Means Tested Exemption with this language.

LEGISLATIVE COMMITTEE REPORT

H. 3176 An Act Relative to the Electronic Filing of Certain Forms Used in Property Valuation

Allows assessors to require, with certain exceptions, that property owners electronically file all forms related to property assessment, abatements, and other applications.

Sponsor: Rep. William MacGregor

2025-26: Revenue Committee

2023-24: Favorable from Revenue Committee. House Third Reading

H. 3102 An Act Expanding the Senior Property Tax Exemption

Right now, seniors can get a \$500 property tax exemption (MGL 59, Section 5, Clause 41C) if they meet certain eligibility criteria. The amount can be increased to \$1,000 by a vote of the legislative body of the municipality. This bill provides the option to increase that to \$2,000 (by vote of the legislative body of the municipality).

Sponsor: Rep. Sean Garballey

2025-26: Revenue Committee

2023-24: Favorable from Revenue Committee. House Third Reading

Please note Section 49 of Governor Healey's Municipal Empowerment Act includes a similar provision but with no cap on the amount that may be voted.

H. 3191 An Act Relative to Condominiums

This bill ensures that communities do not lose the property tax revenue of large-scale condominium projects during the construction phase. Currently, when a master deed to build a condominium project is filed, the value of the land is taken off the tax rolls. This costs communities needed revenue and forces other property owners to pick up that share of tax dollars formally paid by the land. This bill keeps the land on the tax rolls during phases of construction.

Sponsor: Rep. Joan Meschino

2025-26: Revenue Committee

2023-24: Favorable from Revenue Committee. House Third Reading

S. 1964 & H. 3012 An Act Relative to Fines on Certain Commercial and Revenue Property

Creates uniformity in the penalties for commercial and revenue generating property that fail to provide communities with required information for assessment of said property.

Sponsor: Sen. William Driscoll

2025-26: Revenue Committee

2023-24: Assigned to Revenue Committee. Sent to Study

LEGISLATIVE COMMITTEE REPORT

H. 3212 An Act Relative to Ensuring Fairness and Equity in the Assessment of the Value of Property

Authorizes assessors, like land surveyors, to walk a property for exterior inspections.

Sponsor: Rep. Bridget Plouffe

2025-26: Revenue Committee

2023-24: Favorable from Revenue Committee. House Third Reading

H. 3113 An Act Relative to Interest on Abated Bills

Sets the interest rate paid by a community on Appellate Tax Board cases at the current Prime rate on July 1 of the fiscal year. The current 8% rate is out of line with today's banking standards.

Sponsor: Rep. Ken Gordon

2025-26: Revenue Committee

2023-24: Assigned to Revenue Committee. Sent to Study

H. 4027 An Act Relative to Providing Disabled Persons with Motor Vehicle Excise Tax Relief

Updates current law providing auto excise tax assistance to disabled persons, aligning excise assistance for those with permanent loss of limbs.

Sponsor: Rep. Bruce Ayers

2025-2026 New file. Revenue Committee

H. 2336 An Act Relative to Assessor Certificates

Amends local options to increase the stipend for those assessors that attain higher level certifications and designations and broaden the number of eligible certifications.

Sponsor: Rep. Tom Stanley

2025-26: Municipalities and Regional Government Committee

2023-24: Favorable from Municipalities and Regional Government Committee. House Third Reading

Respectfully Submitted,
Lane Partridge, Norwell - Co-Chair
Robbie Alford, Easton
Michael Flynn, Quincy
Teri Gonsalves, Millis
Bill Mitchell, North Andover
Alice Wozniak, Colrain

Kathleen Colleary, Watertown - Co-Chair
Megan Foster, Groton
Michael Gibbons, Concord
Ron Keohan, Saugus
Ken O'Brien, Uxbridge
Victor Santaniello, Wakefield - Ex Officio

NOMINATING COMMITTEE REPORT

The Nominating Committee is pleased to present its report for the fiscal year 2025. This report outlines the activities, processes, and outcomes of the committee in identifying and recommending candidates for the association's leadership positions.

The Nominating Committee for this year consisted of the following members:

R. Lane Partridge, MAA, Norwell - Chairperson

John Nahas, MAA, Truro - Member

Gregory Hamilton, MAA, Shrewsbury - Member

Don Clarke, MAA, Ashland - Member

Maureen Cronin, MAA, South Hadley - Member

The committee members brought diverse perspectives and extensive experience in leadership roles within our Association which were instrumental in conducting a thorough and fair nomination process.

The primary objectives of the Nominating Committee were to:

- Identify and evaluate potential candidates for the Board of Directors and other key leadership positions.
- Ensure that the nominated candidates possess the necessary skills, experience, and commitment to advance the association's mission and strategic goals.

The committee undertook the following steps to fulfill its mandate:

- Issued a call for nominations to the entire membership, encouraging members to suggest potential candidates.

NOMINATING COMMITTEE REPORT

- Reviewed all nominations and evaluated candidates based on predefined criteria, including professional background, leadership experience, commitment to the association's values, and diversity considerations.
- Held several meetings to discuss and deliberate on the candidates' qualifications and fit for the available positions.
- Prepared a final slate of candidates for each open position which was presented to the Executive Board at the February meeting.

The MAAO conducted on-line voting in conjunction with the independent election company Intelliscan, Inc.

Congratulations to the newly elected MAAO Executive Board, we wish you all every success as you serve the membership of the MAAO.

Respectfully submitted,

R. Lane Partridge, MAA - Chair

NOMINATING COMMITTEE REPORT

FISCAL 2026 ELECTION RESULTS

President Elect	Select ONE (1)	Ballots Cast: 342	
*** Eric R Josephson, MAA		332	97.08%
Write In			
	Ashlee Brown	2	0.58%
	Bill Mitchell	1	0.28%
	Edward O'Neil	1	0.28%
	Ellen Blanchard	1	0.28%
	Iwona Wilt	1	0.28%
	Mike Flynn	1	0.28%
	Steve Dunn	1	0.28%
	Tara Monroe	1	0.28%
	Todd Laramie	1	0.28%
Abstain		28	
EXECUTIVE BOARD	Select TWO (2)	Ballots Cast: 370	
*** Kathy Stanley, MAA		232	62.70%
*** Joe Roche, MAA		212	57.30%
Benjamin Styche, MAA		150	40.54%
Thom Welch, MAA		92	24.86%
Write In 1			
	Leandro DiFilippo	2	0.54%
	Melissa Motta	1	0.27%
	Michael Flynn	1	0.27%
	Regan Flood	1	0.27%
Write In 2			

TECHNOLOGY, SOCIAL MEDIA & MARKETING COMMITTEE REPORT

The Technology, Social Media, and Marketing Committee has had a focused and collaborative year. Our work has primarily centered around strengthening presentation materials and improving the Association's online presence.

A major focus this year has been developing polished, consistent, and professional presentation slides for a variety of webinars and in-person educational offerings.

Our committee also assisted with ongoing efforts to modernize the MAAO website, participating in discussions and planning for upcoming updates aimed at improving usability, navigation, and design. While the project is ongoing, we've laid important groundwork and look forward to seeing these updates come to life and enhance the member experience.

On the marketing and social media front, the committee worked to increase visibility and member engagement across platforms. Our hope is that these outreach efforts will help maintain a connected and informed membership. Wait.... you're still reading this? You must *really* care. You should definitely be following MAAO on social media, it's where we share upcoming classes, event updates, and the occasional reminder that deadlines exist.

We are proud of the committee's efforts towards improving MAAO's digital communications, supporting education through quality visual materials, and helping to build a modern, engaging online presence for the Association.

Respectfully submitted,

Mia Robinson, MAA - Chair